

Hispanic Unity of Florida Job Description

Job Title: Financial Success Coach
Department: Center for Working Families (CWF)
Reports To: CWF Program Manager
Classification: Non-Exempt, Full-Time
Work Location: Office / Hybrid
Dated Released: September 2026

CHANGE LIVES AND MAKE A DIFFERENCE!

At Hispanic Unity of Florida (HUF), we change lives every single day – in small and big ways. If you want to join an exceptional organization that works tirelessly to ensure everyone is empowered to live their American dream, please continue reading.

It is imperative that all applicants share the HUF values, as they serve as the foundation for how we treat each other, our clients, our funders, and everyone we come in contact with. Those values include but are not limited to, Integrity, transparency, respect, dignity, accountability, diversity and cultural awareness, commitment to excellence, collaboration, *and teamwork*.

Job Summary:

The Financial Success Coach provides individualized coaching, guidance, and case management services to help low- and moderate-income individuals and families achieve greater financial stability and long-term economic mobility. Using Hispanic Unity of Florida's integrated Center for Working Families (CWF) model, the Financial Success Coach partners with participants to identify goals, address barriers, and develop action plans that support financial well-being and self-sufficiency.

The Financial Success Coach utilizes an integrated coaching approach that addresses financial well-being, employment and income advancement, housing stability, access to public benefits, and asset-building opportunities. This includes helping participants strengthen financial capability, improve budgeting and money management skills, build or repair credit, increase savings, access community resources, pursue career advancement opportunities, prepare for homeownership, and explore entrepreneurship pathways.

Serving as a trusted coach and accountability partner, the Financial Success Coach supports participants in implementing strategies that lead to measurable improvements in financial resilience, income growth, employment, housing stability, and wealth-building outcomes. This position is ideal for an individual who is passionate about empowering individuals and families to achieve financial success, build assets, and create pathways toward long-term economic mobility, financial security, and wealth building.

Essential Duties:

- Manage an active caseload and maintain ongoing engagement with participants.
- Conduct financial assessments and develop individualized action plans to support financial stability and economic mobility.

- Provide one-on-one financial coaching focused on budgeting, savings, debt reduction, credit improvement, and financial goal attainment.
- Deliver credit education and coaching, including reviewing credit reports and developing credit-building strategies.
- Assess participant eligibility for public benefits, supportive services, and community resources, and provide referrals and application assistance as appropriate.
- Support participants in achieving employment and income goals through career coaching, workforce partnerships, referrals, and training opportunities.
- Connect participants to housing stability, homeownership, entrepreneurship, and other asset-building resources.
- Facilitate financial education workshops, orientations, and presentations in individual, group, in-person, and virtual settings.
- Conduct outreach, recruitment, enrollment, and community engagement activities to expand program participation.
- Develop and maintain productive relationships with community partners, employers, financial institutions, and referral sources.
- Maintain accurate client records, case notes, assessments, referrals, and outcomes in agency databases.
- Track performance indicators and support program reporting, monitoring, audits, and quality improvement activities.
- Ensure compliance with agency policies, confidentiality standards, and funder requirements.

Qualifications and Job Requirements:

- Strong communication and interpersonal skills, with the ability to engage diverse audiences.
- Experience providing financial coaching, workforce development, case management, or related human services preferred.
- Knowledge of personal finance, budgeting, credit building, debt management, and savings strategies.
- The candidate must possess strong communication, organizational, and problem-solving skills, attention to detail, and be able to prioritize multiple tasks.
- Knowledge of community resources, workforce services, and social service networks in Broward and/or Miami-Dade Counties preferred.
- Ability to work effectively in a team environment, have a positive attitude, and handle sensitive and confidential information with maximum discretion.
- Bilingual English/Spanish strongly preferred
- Experience with case management systems, client documentation, performance tracking, and data entry preferred.
- Proficiency in Word, Excel, Outlook, and PowerPoint and virtual platforms like Zoom, Go to Meeting, Microsoft Teams, and Google Meets.
- Ability to pass a Level 2 background check. Possession of a valid Florida driver's license and insurance, with the ability to travel independently (proof required).

Education and Experience:

- Associate degree required. Bachelor's degree preferred in Human Services, Social Work, Business Administration, Economics, Public Administration, Education, or a related field. An equivalent combination of education and experience will be considered.

- Experience in financial coaching, financial capability, workforce development, case management, career coaching, banking, lending, community development, or related fields preferred.

Preferred Certifications:

- HUD Certified Housing Counselor
- Certified Educator in Personal Finance (CEPF®)
- Accredited Financial Counselor (AFC®)
- NALCAB Financial Capability Training
- NeighborWorks Certification

Working Environment:

Local travel throughout Broward County and/or Miami-Dade County required. Occasional evening and weekend workshops or events. The work for this position will be done in the office and at community events. The office is conditioned for the individual to perform the duties required in a private and confidential setting. If work is done remotely, the remote office should be held to the same private and confidential standards. The person must be able to travel back and forth from HUF locations and home as needed.

Physical Requirements:

- Prolonged periods sitting at a desk and working on a computer.
- Must be able to lift up to 15 pounds at times.

Hispanic Unity of Florida is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the employer will provide reasonable accommodations to qualified individuals with disabilities and encourage both prospective and current employees to discuss potential accommodations with the employer.

I have read my job description and understand my responsibilities.

Employees Signature _____ Date: _____

Supervisor's Signature _____ Date: _____

Title: _____

This job description does not alter your “at-will” status. It is not an employee agreement or contract. Management has the right to alter this job description at any time with or without notice. Employee understands that other tasks or duties may be added or assigned from time to time, at the discretion of the administration.